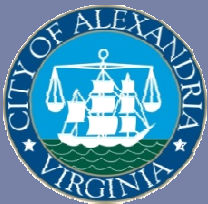


Eisenhower West Industrial Land Use Study

Presentation of Findings Response to Comments

September 15, 2009

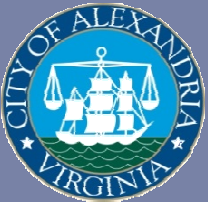


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Presentation Outline

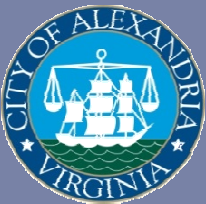
- Introduction
- Existing Industrial Operations
- Summary of Findings
- Public Comments
- Next Steps



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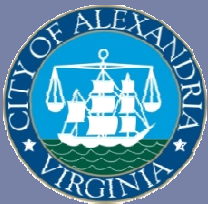
Purpose of Study

- Compare economic and environmental conditions of existing industrial uses and redevelopment alternatives
- Provide the background information necessary to inform a future Eisenhower West Small Area Plan



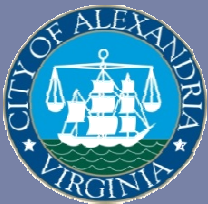
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Existing Industrial Uses



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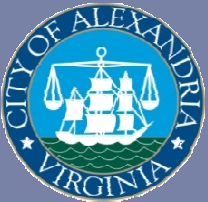
Summary of Findings



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What is the redevelopment potential of the area?

- Redevelopment of the study area will likely be long term
 - Short term demand can be met by other planned development
 - The study area will be competing with more attractive redevelopment sites
- Likely stronger market support for residential use than office or retail uses
- Neighborhood serving retail is appropriate



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What is the redevelopment potential of the area? (cont'd)

| Alternatives | Vulcan | Virginia Paving | Covanta | Norfolk Southern |
|---|---|---|---------------------------------------|---------------------------------------|
| A: Baseline | Townhouses, low rise multi family; retail | Townhouses, low rise multi family; retail | Mid-rise Office, retail | Mid-rise Office, retail |
| B: Baseline plus Open Space | Townhouses, low rise multi family; retail | Park/Open Space | Mid-rise Office, retail | Mid-rise Office, retail |
| C: Baseline minus Covanta and Norfolk southern | Townhouses, low rise multi family; retail | Townhouses, low rise multi family; retail | No Change | No Change |
| D: Baseline plus Additional density and bridge | Townhouses, low rise multi family; retail | Townhouses, low rise multi family; retail | Mid-rise Office, retail, multi family | Mid-rise Office, retail, multi family |

Would the potential value appreciation encourage the current operations to relocate?

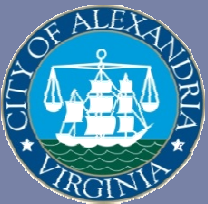
| | Vulcan | Virginia Paving | Covanta | Norfolk Southern |
|---|-----------------|-------------------------|---------------------|------------------|
| Est. Relocation | \$15.5 million | \$10.5 - \$14.5 million | Min \$300 million | N/A |
| Est. Cessation | \$15-17 million | \$23-27 million | Min. \$11.5 million | N/A |
| Change in Residual Land Value from Current Use | | | | |
| Alternative A | \$10.2 million | (\$1.2 million) | (\$24.5 million) | \$13.1 million |
| Alternative B | \$10.2 million | No Change | (\$24.3 million) | \$13.1 million |
| Alternative C | \$10.2 million | (\$1.2 million) | No Change | No Change |
| Alternative D | \$22 million | \$5.3 million | (\$24.3 million) | \$17.9 million |
| Does Change in Land Value Support Relocation or Cessation? | | | | |
| | Possibly Alt. D | No | No | Unknown |

Comparison of economic & environmental impacts

| Benefits/cost | Status Quo | Alternatives | | | |
|--|------------|---|----------------|----------------|----------------|
| | | A | B | C | D |
| Economic | | | | | |
| Fiscal Impact | \$890,000 | \$4.45 million | \$4.23 million | \$1.95 million | \$3.62 million |
| Potential Employees | 234 | 4,500 | 4,460 | 80 | 2,500 |
| Environmental | | | | | |
| CO NOx PM ₁₀ PM _{2.5} SO ₂ VOC | N/A | Change in emissions from Status Quo (tons/year) | | | |
| | | -16 | -20 | 7.3 | -50 |
| | | -579 | -579 | -11 | -586 |
| | | -7.6 | -7.9 | -6.4 | -10.2 |
| | | -7.6 | -7.7 | -4.8 | -7.8 |
| | | -18 | -18 | -5.1 | -18 |
| | | 0.6 | 0.1 | -1.6 | -3.4 |

Overall findings

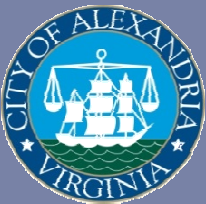
- Significant constraints to redevelopment exist
- There could be some fiscal and economic benefits if hurdles can be overcome
- Comprehensive redevelopment would likely require City involvement



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Further consideration

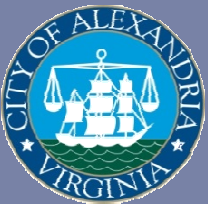
- Improve existing conditions
- Explore if rezoning is appropriate through a small area planning process
 - Continued industrial use
 - Conditions under which mixed-use redevelopment should occur
 - Promotion of transit-oriented development



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Response to public comments

- 3 main categories of public comments
 1. Technical and other corrections
 2. Comments on redevelopment scenarios
 3. Comments on use of consultants

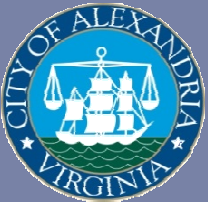


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Response to Public Comments

1. Technical and other corrections

- Updated air quality data and tax revenues from Industrial Users
- Clarification on business processes and operations
- Virginia Paving receives aggregate from Vulcan's quarry in Manassas
- Revisions had a minor effect on the data and no effect on the conclusions



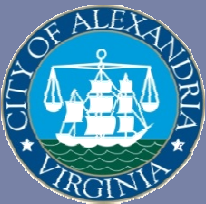
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Response to public comments

2. Redevelopment scenarios:

a) **More density in redevelopment alternatives**

- FAR is based on market, not what is more desirable
- Some barriers to achieving higher densities
- Small area plan process can address some of those barriers
- FAR of 4.8 would yield buildings 10-20 stories high



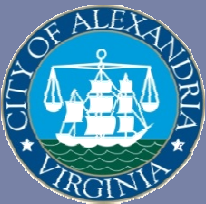
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Response to public comments

2. Redevelopment scenarios:

b) Other Comments

- Alternative B designates VA Paving as open space due to floodplain, Resource Protection Area, and proximity to existing open space
- Conservative approach to development in the floodplain
- Re-zoning can cause existing use to be “non-conforming,” but does not require business cessation

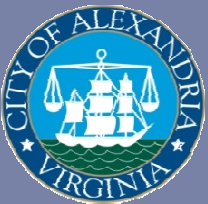


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Response to public comments

3. Purpose of study and use of consultants

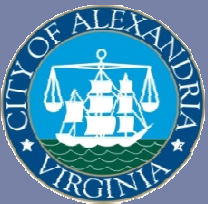
- Purpose of study is to inform future planning efforts and exam redevelopment potential
- Consultants provided expertise in economic analysis and environmental assessment
- Staff has been involved in the study



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Next Steps

- Submit study to Planning Commission and City Council for their receipt in October
- No plans to hold a public hearing
- Eisenhower West Small Area Plan is currently scheduled to begin at end of 2010



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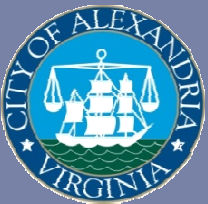
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